

## External User – Request to Add to Recipient Portal

**Browser:** Log into AmpliFund, <https://ne.amplifund.com> using Google Chrome, Mozilla Firefox, or Microsoft Edge.

### Who is an External User?

An **External User** is someone who needs access to your Recipient Portal that is not in your Organization (3<sup>rd</sup> Party) to be able to access one or more awards. The most common instance is a consultant who is managing the post award process for a municipality.

### How many forms do I complete?

Only one External User Consent Form needs to be completed per recipient account per external user.

*Example 1: Anytown needs to add John Smith from Acme Corp as an External User. Anytown should complete ONE External User Consent forms. Even if Anytown has three awards, they only need to complete one form.*

*Example 2: Anytown needs to add John Smith and Jane Doe from Acme Corp as External Users. Anytown should complete TWO External User Consent Forms – one for John and one for Jane.*

### How long does this process take?

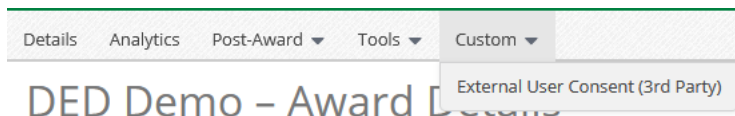
After you have followed the steps below to complete an External User Request form, DED will process your request within three business days.

## Request an External User be Given Access to your Account

### Step 1: Fill out the ‘External User Consent (3<sup>rd</sup> Party)’ form

Completing the Form on the Award

1. Grant Management (left navigation) > Grants > [Choose Your Grant] > Custom (tab) > External User Consent (3<sup>rd</sup> Party)



2. To create a form, click the + in the top right corner.



**NOTE:** You will need to create a separate form for each External User that you are requesting to add to your account.

3. Complete the **Recipient**, **External User – To Be Added**, and **Electronic Signature** sections.

#### Recipient Section

**NOTE:** This section refers to the organization that received the grant, NOT the external user who will manage the grant on behalf of the recipient.

4. Complete the **Recipient Section**
  - **Contract Number:** The contract number assigned to you by DED.
    - e.g. 20DTR000 or 20-00-000
  - **Recipient Organization Name:** Name of the organization that *received* the award, not the third party managing the award
    - **NOTE:** Use the full organization name with the abbreviation in parentheses, if applicable

- e.g. Nebraska Department of Economic Development (DED)
- **Award Name:** The name of your award
  - **NOTE:** This can be found on the Award Details page in AmpliFund.
    - Grant Management (left navigation) > Grants > [Choose Your Grant].

## Recipient

Contract Number (Award Identification Number)\*

Recipient Organization Name\*

Award Name\*

## External User-To be Added Section

**NOTE:** This section refers to the external organization and user who will manage the grant on behalf of the recipient, NOT the organization that received the grant.

5. Complete the **External User – To be Added** section
  - **External User Organization Name:** Full name of the external organization who will manage the grant on behalf of the recipient, NOT the organization that received the grant
    - **NOTE:** Use the full organization name with the abbreviation in parentheses, if applicable
      - e.g. Nebraska Department of Economic Development (DED)
  - **First & Last Name & Email Address:** First and last name and email of the user who works at the external organization and will be managing the award on behalf of the recipient

## External User - To Be Added

External User Organization Name\*

First Name\*

Last Name\*

Email Address\*

6. When you are done, click **Create** at the bottom of your screen.

Create

Cancel

## Edit the Form (if needed)

- After creation, you will see your list of External Users forms. If you need to edit a form, click the edit pencil next to the form.

DED Demo – External User Consent (3rd Party)

Drag a column header and drop it here to group by that column

Contract Number (Award Id...)	Award Name	External User Organization ...	First Name	Last Name	Email Address	Date Form is Completed by...	Has the External User Cons...
123456	DED DEMO	Test Consulting Firm	Jerry	Gergich	jerry.gergich@test.com	12/31/2020	Yes

- After you have completed any edits, click the **Save** button in the bottom right corner.



- If you need to add a form for another user, click the **+** in the top right corner.



## Step 2: After being notified from DED that the user has been added, you can now assign the External User as the 'Recipient Grant Manager' to your award in your Recipient Portal.

### Notification

- You will receive an email when the External User has been added to your Recipient Account.

### Assign as Recipient Grant Manager

- Navigate to the Award: Grant Management (left navigation) > Grants > [Choose Your Grant] > Click the Edit Pencil icon (top right)



- Scroll down to the **Award Information** section, in the dropdown select the User.

Recipient Grant Manager\* John Doe

Award Identification Number Jerry Gergich

RFP ID Number John Doe

- Click the **Save** icon in the bottom right corner.



## Security Roles

- Verify the External User has the security role of **Department User (No Salary)**. This ensures that they will only see award information to which they are assigned.

**Additional Resources:** For more information on what security roles your External User should have, please view 'Security Roles' and 'Security Roles Matrix' user guides here, <http://opportunity.nebraska.gov/amplifund/#FAQ-Award-Management>.